Complete OJS Setup Checklist

Step-by-Step Guide to Launch a Professional Academic Journal

Open Journal Systems (OJS) 3.x | Scopus Ready | DOAJ Compliant | DOI/Crossref Integrated

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How to use this checklist: Go through each phase in order. Tick each checkbox as you complete it. Use the notes and tips to avoid common mistakes. Share with your journal team for smooth collaboration.

01 PHASE 1: Pre-Installation & Domain Setup

- ■ Choose a domain name for your journal (e.g., journalname.com or university subdomain)
  - ■ *Use a domain that reflects your journal scope; avoid hyphens if possible*
- ■ Purchase or configure web hosting (VPS/Shared/University server)
  - ■ *OJS requires PHP 7.4+ and MySQL/PostgreSQL. VPS recommended for performance*
- ■ Ensure server meets OJS minimum requirements: PHP 7.4+, MySQL 5.7+, Apache/Nginx

✓ Tip: Check phpinfo() to confirm PHP version before installing

- ■ Create a dedicated MySQL database and user for OJS
- ■ Enable mod_rewrite (Apache) or equivalent for clean URLs
- ■ Set up an SSL certificate (HTTPS) – required for indexing and credibility
  - ■ *Let's Encrypt provides free SSL*
- ■ Create a professional email (editor@journalname.com) for journal correspondence
- ■ Decide your journal URL structure: /journal or subdomain

02 PHASE 2: OJS Installation & Basic Configuration

- ■ Download latest stable OJS 3.x from pkp.sfu.ca/ojs/ojs_download
- ■ Upload OJS files to server via FTP/SFTP or SSH
  - ■ *Use /public_html/ or a subdirectory depending on your setup*
- ■ Set correct folder permissions: files/ directory = 755 or 775
- ■ Run OJS web installer at yourdomain.com/index.php/index/install
  - ■ *Have DB credentials ready before starting*
- ■ Configure config.inc.php: base_url, database, email settings
- ■ Set up the files_dir outside webroot for security
  - ■ *e.g., /home/user/ojs_files – not inside public_html*
- ■ Test basic installation – confirm admin login works
- ■ Enable HTTPS redirect in config.inc.php (force_ssl = On)
- ■ Configure PHP memory_limit to at least 256M in php.ini

- ■ Set up cron job for scheduled tasks (optional but recommended)

03 PHASE 3: Journal Identity & Settings

- ■ Enter Journal Title, Initials, and Abbreviation
- ■ Write a clear, scope-focused Journal Description (150-300 words)
  - ■ *Avoid vague descriptions. Mention subject area, audience, and publication type*
- ■ Upload Journal Logo and Cover Image (high-resolution PNG/JPG)
  - ■ *Recommended: Logo 300x80px, Cover 800x600px*
- ■ Set Publisher Information: publisher name, address, country
  - ■ *Must match your ISSN application*
- ■ Add Online ISSN and Print ISSN (apply via issn.org if not obtained)
  - ■ *ISSN is mandatory for indexing applications*
- ■ Configure Contact Information: principal and technical contact
  - ■ *Use institutional email for credibility*
- ■ Set Journal Focus and Scope clearly
  - ■ *Include subject areas, type of articles accepted (research, review, case study)*
- ■ Define Review Policy: blind review type, timeline, criteria
- ■ Add Author Guidelines with formatting, word limit, citation style
- ■ Create Submission Checklist for authors
- ■ Add Copyright Notice and Licensing Policy (CC BY, CC BY-NC, etc.)
  - ■ *Open Access journals should use Creative Commons licenses for DOAJ*
- ■ Configure Privacy Statement for GDPR compliance
- ■ Set up custom Navigation Menu items (About, Editorial Board, etc.)
- ■ Create Sections: Original Research, Review, Case Study, Editorial, etc.
  - ■ *Each section can have its own peer-review and indexing settings*

04 PHASE 4: User Roles & Editorial Board Setup

- ■ Create user accounts for Editor-in-Chief, Section Editors, and Managing Editor
- ■ Assign appropriate roles to each user (Journal Manager, Editor, Section Editor)
  - ■ *Role assignment controls what each user can see and do in OJS*
- ■ Create and populate the Editorial Board page with bios and affiliations
  - ■ *Editorial board quality is evaluated by Scopus and Web of Science during indexing*
- ■ Invite reviewers and create reviewer accounts with areas of expertise
- ■ Configure email notifications for each user role
- ■ Test the full submission-to-publication workflow with a test article
  - ■ *Submit a dummy article and walk through every step to catch issues*
- ■ Set up automated email templates (submission acknowledgment, review requests, decisions)
- ■ Configure review forms and criteria if using structured peer review
- ■ Set reviewer deadlines and reminder settings

05 PHASE 5: DOI Registration & Crossref Integration

Why DOIs matter: DOIs are permanent identifiers that make your articles findable and citable. Crossref membership is required for Scopus and Web of Science indexing consideration.

- ■ Apply for Crossref membership at crossref.org (annual fee applies)
  - ■ *Crossref membership gives you a DOI prefix (e.g., 10.XXXXX)*
- ■ Install and configure the Crossref DOI Deposit Plugin in OJS
  - ■ *Go to Website > Plugins > Import/Export Plugins*
- ■ Set DOI suffix pattern (e.g., journal abbreviation + volume/issue/article)
- ■ Enable automatic DOI assignment for articles
- ■ Configure Crossref credentials in plugin settings (username, password, depositor info)
- ■ Test DOI deposit with a published article and verify at doi.org
- ■ Enable CrossRef Reference Linking Plugin for reference metadata
  - ■ *Improves citation tracking and article discoverability*
- ■ Register your journal ISSN with Crossref
- ■ Set up DOI for journal issues as well (optional but recommended)

06 PHASE 6: Indexing Preparation (DOAJ, Scopus, WoS)

DOAJ (Directory of Open Access Journals)

- ■ Ensure journal is fully Open Access with no embargo period
  - ■ *DOAJ requires immediate open access – no delayed access allowed*
- ■ Add Creative Commons license to all article pages
- ■ Include article-level metadata: abstracts, keywords, author affiliations on website
- ■ Enable DOAJ Article-level XML export plugin in OJS
- ■ Apply at doaj.org with complete and accurate journal information
  - ■ *DOAJ review takes 3-6 months on average*

Scopus Indexing Requirements

- ■ Publish minimum 2 full volumes with consistent, on-time publishing
  - ■ *Scopus evaluates publishing consistency over time*
- ■ Ensure all articles have English abstracts, keywords, and author details
- ■ Build a credible, diverse editorial board with ORCID profiles
  - ■ *International diversity of editorial board is a key Scopus criterion*
- ■ Implement peer review process and clearly document it on website
- ■ Obtain ISSN (both print and online if applicable)
- ■ Enable XML/JATS export for article metadata
  - ■ *Scopus requires structured metadata. JATS XML is the standard format*
- ■ Apply via Scopus Source Evaluation at elsevier.com/solutions/scopus
  - ■ *Use the official Scopus Source Submission system*
- ■ Prepare citation analysis and author diversity statistics for application

07 PHASE 7: Essential OJS Plugins & Integrations

Plugin Name	Purpose
CrossRef Reference Linking Plugin	Automatically links references to DOIs

ORCID Profile Plugin	Links authors to ORCID iDs – required for many indexes
Google Scholar Metadata Plugin	Ensures articles are indexed by Google Scholar
Plum Analytics / Dimensions Plugin	Adds article-level metrics and altmetrics
Lens Reader Plugin	Modern online article viewer for HTML articles
Akismet Anti-Spam Plugin	Blocks spam registrations and submissions
Subscription Manager Plugin	For hybrid journals with subscription content
PubMed/MEDLINE Export Plugin	For biomedical journals targeting PubMed indexing
QuickSubmit Plugin	Bulk import of backissues to OJS
Static Pages Plugin	Create custom pages (About, Team, etc.)
Recommend Articles Plugin	Shows related articles to increase engagement
Usage Statistics Plugin	Tracks downloads, views per article
Wikibase Integration	Connect article metadata to Wikidata
PKP PN (Preservation Network) Plugin	Long-term digital preservation

08 PHASE 8: Security, Performance & Maintenance

- ■ Enable two-factor authentication for admin accounts
- ■ Set up daily/weekly automated backups of database and files
  - ■ *Store backups off-server (S3, Google Drive, or remote FTP)*
- ■ Install an SSL certificate and force HTTPS site-wide
- ■ Keep OJS updated to the latest stable version
  - ■ *Check pkp.sfu.ca/ojs regularly for security patches*
- ■ Configure web application firewall (WAF) or use Cloudflare
- ■ Set up server-level caching (Opcache, Redis) for better performance
- ■ Enable file upload restrictions (allowed types, max size) in OJS settings
- ■ Monitor server logs for unusual activity
- ■ Test site speed with Google PageSpeed Insights (target > 70)
- ■ Verify mobile responsiveness of journal theme
- ■ Add sitemap.xml and submit to Google Search Console
- ■ Implement robots.txt to guide search engine crawlers

09 PHASE 9: First Issue Publishing Workflow

- ■ Create journal Volume 1, Issue 1 in OJS
- ■ Ensure all articles have complete metadata: title, abstract, keywords, authors, affiliations
  - ■ *Missing metadata is a common reason for rejection by indexes*
- ■ Upload full-text PDFs and ensure they are text-searchable (not scanned images)
- ■ Add JATS/NLM XML files for each article (required for PubMed, Scopus)
  - ■ *Use JATS4R guidelines for compliant XML*
- ■ Assign DOIs to all articles before publishing

- ■ Add article-level supplementary files if applicable
- ■ Review and proofread all metadata on the published article pages
- ■ Publish the issue and verify all links work correctly
- ■ Deposit DOI metadata to Crossref after publishing
- ■ Index articles in Google Scholar (automatic within 6-8 weeks if setup is correct)
- ■ Submit issue to abstracting/indexing services you've joined
- ■ Announce new issue on journal social media and email list

QUICK REFERENCE: Key OJS Resources

Resource	URL / Description
OJS Official Download	pkp.sfu.ca/ojs/ojs_download
OJS Documentation	docs.pkp.sfu.ca
PKP Forum (Community Support)	forum.pkp.sfu.ca
Crossref Membership	crossref.org/membership
DOAJ Application	doaj.org/apply
Scopus Source Evaluation	elsevier.com/solutions/scopus
ISSN Portal	portal.issn.org
ORCID Registration	orcid.org/register
JATS XML Reference	jats.nlm.nih.gov
Google Scholar Inclusion	scholar.google.com/intl/en/scholar/inclusion.html
Predatory Journal Check (Beall's)	beallslist.net

TOP 10 OJS SETUP MISTAKES TO AVOID

1	**Using Shared Hosting for Production** Shared hosting is unreliable for OJS. Use VPS or dedicated server for better performance and control.
2	**Skipping SSL Certificate** HTTPS is not optional. Browsers flag HTTP sites as insecure, and many indexes require SSL.
3	**Not Setting Up Automated Backups** OJS databases can grow large. Automate daily backups to avoid catastrophic data loss.
4	**Poor Editorial Board Selection** Having unqualified or unverified editors destroys credibility. Verify all affiliations before listing.
5	**Applying for Indexing Too Early** Scopus and DOAJ require a track record. Apply only after publishing 2+ consistent volumes.
6	**Non-Searchable PDFs** Never upload scanned image PDFs. All PDFs must have selectable/searchable text.

7	**Missing JATS XML** Most major indexes require JATS XML metadata. Don't skip this – it's essential for discoverability.
8	**Ignoring DOI Deposit** Assigning DOIs in OJS is only Step 1. You must also deposit metadata to Crossref for DOIs to resolve.
9	**Vague Aims & Scope** Vague scope statements confuse authors and indexers. Be specific about subject area and article types.
10	**Outdated OJS Version** Old OJS versions have security vulnerabilities. Always use the latest stable release.

Need Help Setting Up Your OJS Journal?

Setting up OJS the right way takes expertise. Whether you're launching a new journal or fixing an existing one, I provide end-to-end OJS setup, customization, and indexing support.

Services I Offer:

■ **Complete OJS Installation & Setup**	Fresh OJS install, theme customization, mobile-optimized design
■ **Crossref & DOI Integration**	DOI setup, Crossref membership guidance, metadata deposit
■ **DOAJ & Scopus Indexing Preparation**	Full audit and application support for major indexes
■ **JATS XML Production**	Article-level XML for all international indexing requirements
■ **OJS Theme & UI Customization**	Professional, responsive journal themes with brand identity
■ **OJS Migration & Upgrades**	Safe migration from older OJS versions with zero data loss
■ **Editorial Workflow Training**	Train your editorial team on OJS submission/review workflow
■ **Journal Audit & Compliance**	Full review of your journal against indexing standards

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62+ Journals Launched Worldwide	**30+ Journals Successfully Indexed in Scopus**
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